University of FI$Cal

A message from Neeraj Chauhan, Chief Deputy Director

May is graduation month, and in the coming weeks, FI$Cal will have our own graduating class to celebrate. Our newly minted University of FI$Cal (UF) is a progressive learning program that offers year-round training in the FI$Cal system.

Formerly known as the FI$Cal Training Academy, UF will continue to provide all required courses for 2017 Release and 2018 Release department end users as they migrate into the FI$Cal system. Additionally, UF will offer opportunities for enrollees to further their education and earn Bronze level certification in eight functional modules: Solicitations & Contracts, Purchasing, Asset Management, Accounts Payable, Accounts Receivable/Billing, Cash Management, Project Grants & Contracts, and General Ledger. In the coming months, UF will offer higher levels of certification at the Silver and Gold levels.

Users who voluntarily participate in the UF certification program demonstrate a career growth mindset. The UF curriculum allows enrollees to improve

State Library Tells Their Wave 2 Story

The California State Library has a long history that predates our state government. It was established even before California was admitted to the union and its main branch in the Stanley Mosk Library and Courts Building was named to the National Register of Historic Places. Though the Library's staff spends much of its time making sure Californians have access to its many resources from the past, they kept an eye on the future when they transitioned into FI$Cal.

Back row, L to R: Anh Khieu, Maria Vicente, Sharleen Finn, and Debra Yang. Front: Kim Lee.

Because the Library was a small department, it used to contract with the Department of General Services to handle their accounting services. When

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2017 Release Transition Meetings Start End of May

Transition Meetings for 2017 Release departments are scheduled to begin in late May. During these meetings, important information will be shared with departments regarding Cut Over instructions, FI$Cal system freeze dates, working with the FI$Cal Service Center, and more.

The Transition Meetings will be held both at the FI$Cal office and via webinar. Department Liaisons will receive email notices for each meeting and should identify participants from their departments to attend.

There will be frequent and rapid changes in the weeks leading up to the July Release. Departments are highly encouraged to have a representative attend each Transition Meeting so that their department is fully informed and prepared for the changes occurring before and after Go Live.

If you have questions regarding the upcoming Transition Meetings, please contact your Readiness Coordinator.

FI$Cal Publishes First Strategic Plan

The Department of FI$Cal released its first Strategic Plan in April. The Strategic Plan for 2017-2021 defines FI$Cal's mission, vision and goals and explains the fundamental importance behind the State of California having an integrated financial management system, and its benefits to the people of our state. The Plan will serve as the guidepost over the next five years as the Department moves through final project implementation and into operation and maintenance of the FI$Cal System.
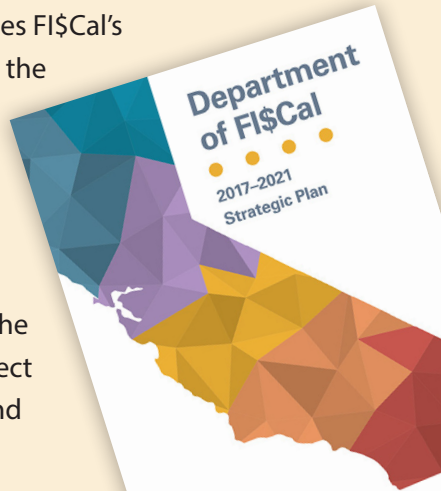
Production Freeze on May 1

FI$Cal's Information Technology Division is gearing up to transition the 2017 Release departments from their legacy systems into FI$Cal. By placing a freeze on production and limiting change requests to only the most critical, the IT team can focus its efforts on a clean and accurate transfer of data. Beginning May 1 through 2017 Release "Go Live," FI$Cal will process only those change requests that departments identify as business critical with no work around. Non-critical change requests submitted during this period will be considered after completion of the 2017 Release.

Get To Know the FSC – Lee Xiong

Lee Xiong might be new to the FI$Cal Service Center (FSC), but he is not new to the FI$Cal Project. When he started with FI$Cal, Lee was a Department of General Services employee on the Business Team working on procurement functionality.

Lee became a FI$Cal FSC employee in March. "After five years of working on more business functionality oriented assignments I wanted to expand my knowledge base and try something new," said Lee.

Over the past two months he has been busy getting up to speed and transferring his knowledge of the business side of the FI$Cal system to the technical issues he now handles as an FSC client representative. Lee has primarily been assisting clients with Level 2 procurement issues because of his procurement functionality experience, but he is also being trained to respond to other types of Level 2 calls.

Lee said, "I like being able to help customers work through an issue and see it through to a resolution. Working on the project assignment side it's a bigger picture, you don't always get to see the end result. Working in the FSC I get to see that end result."

Along with helping FSC clients, Lee has been putting his Business Team experience with Operational Decision Making Framework issues to use working on change requests coming into the FSC, reviewing User Productivity Kits used for end user training, and reviewing Job Aids.

Outside of work Lee is very active with the Sheldon High School wrestling booster club. He spends a great deal of his time driving his eight year old and 17 year old sons to wrestling activities and his seven year old daughter to dance class. When he gets some time for himself he likes to run and hike.

What we believe in...

Trust

Commitment to building and maintaining the confidence of our clients, stakeholders, and the public.

We strive to build and maintain stakeholder confidence by providing transparency to the public that we serve.

FI$Cal
One state. One system.

2017 Release Conversion File Reminder

Conversion and testing activities are ramping up as we approach Go Live for the 2017 Release.

Departments must complete upload of their files into the Data Conversions Portal by May 4 in order for end users to participate in upcoming "Dry Run" data validation sessions.

These sessions will give departmental subject matter experts (SMEs) an opportunity to view their data in the FI$Cal system before their department onboards with FI$Cal.

Department liaisons will receive a meeting invitation for each conversion validation session that will take place from May 22 through May 26. Liaisons should identify who from their department should participate.

In June, departments will have one more chance to submit conversion data for validations during "Dress Rehearsal" activities. Dress Rehearsal will be the final test before the curtain goes up and the 2017 departments cutover to FI$Cal and are live in the system.

If you have questions regarding these upcoming activities, please contact your Readiness Coordinator.

Updated FI$Cal Job Aids

As of April 20, 2017

Module	Job Aid Title	Job Aid Brief Description	Date Published
Accessibility	Request Access to User in Identity Self-Service 3.0	How to request access for users in Identity Self-Service they have authority over.	04/20/2017
Accessibility	Assign Hyperion Role in Identity Self-Service 2.0	How to assign Hyperion Role to users in Identity Self-Service they have authority over.	04/20/2017
Accessibility	Additional Role Information for Summary Role Request 2.0	How to Add Additional Information for a Summary Role Request.	04/20/2017
General Ledger, GL Conversions, and Year End Close	Spreadsheet Budget Journal Upload 2.0	Provides instructions for how to upload budget entries from Excel to FI$Cal.	04/17/2017
Project Costing	PC Interface Upload 1.0	Provides information on how to set up a .csv file for projects, activities, team, and non-financial transactions for the upload and then how to run the process.	04/17/2017
Vendor Management	Adding a Supplier Record 3.0	Provides Department Vendor Processors (DVP) instructions for submitting a request to add a supplier record to the FI$Cal Vendor Management File (VMF).	04/03/2017

You may view all Job Aids here.

WebEx a Resourceful Tool

Last year the FI$Cal Service Center (FSC) launched the WebEx online meeting tool. The tool enables clients to share their screen with an FSC representative so the FSC can see firsthand the issue the client is having on their computer. Over the past year, WebEx has allowed the FSC to help clients navigate solutions, and resolve tickets faster.

Since its launch, client response to WebEx has been positive. One client said, "The person that took care of my issue used WebEx and it was excellent." Another commented, "We were having a major challenge with the site and the analyst was able to pinpoint the problem using WebEx and resolve it."

Clients can use WebEx at any time during their ticket life cycle and can either speak directly by phone with an FSC representative when using WebEx or use the chat feature. WebEx is a secure, encrypted method of ticket resolution allowing the client to control what they share.

If you are interested in using WebEx email the FSC or call (855) 347-2250.

Employee Assistance Program

1-866-EAP-4SAC
(1-800-327-4762)

TTY users should call
1-800-424-6117

Visit us online at
www.eap.calhr.ca.gov

University of FI$Cal

their skills for their daily jobs, and also explore new career options for tomorrow. Users who enroll in modules unrelated to their current roles can see what it's like to perform different kinds of jobs in the system.

UF is a training program that goes beyond the coursework users have taken to onboard. We encourage 2017 Release and 2018 Release end users to complete required onboarding training before enrolling in the additional UF coursework. All of the courses are transferrable. If a user decides to enroll in a UF module, any courses already completed will go toward certification. In fact, more than 760 end users have already qualified to receive their Bronze level certification in one or more modules. Users who have qualified will receive an email this month with the first certificate attached.

We're very excited to offer our end users this extra level of support and training in the FI$Cal system. FI$Cal works because of your commitment and expertise. Please visit our UF page to learn more about the various training opportunities.

Congratulations to the class of 2017!

MAY 2017 EVENTS CALENDAR

MAY 1
- April Payday
- TECH749: FI$Cal Roles for Production Support Sessions — 9 a.m. - 12 p.m. & 1 p.m. - 4 p.m.
- 2017 Release Training Liaison Conference Call — 9:30 a.m. - 11 a.m.
- TRNG708: Attend 2017 Release Training Liaison Web Meeting — 10 a.m. - 11 a.m.

MAY 1-4
- BUSN737c: Participate in Department Configuration, Role, and Data Validation - Accounts Receivable — 9 a.m. - 4 p.m.

MAY 2
- Participate in Weekly Interfaces and Conversions Support Sessions — 9 a.m. - 12 p.m.

MAY 3
- TECH749: FI$Cal Roles for Production Support Sessions — 9 a.m. - 12 p.m.

MAY 4
- Participate in Weekly Interfaces and Conversions Support Sessions — 9 a.m. - 12 p.m.

MAY 5
- TECH749: FI$Cal Roles for Production Support Sessions — 9 a.m. - 12 p.m.

MAY 8
- TRNG708: Attend 2017 Release Training Liaison Web Meeting — 10 a.m. - 11 a.m.

MAY 9
- Participate in Weekly Interfaces and Conversions Support Sessions — 9 a.m. - 12 p.m.

MAY 11
- Participate in Weekly Interfaces and Conversions Support Sessions — 9 a.m. - 12 p.m.

MAY 15
- 2017 Release Training Liaison Conference Call — 9:30 a.m. - 11 a.m.
- TRNG708: Attend 2017 Release Training Liaison Web Meeting — 10 a.m. - 11 a.m.

MAY 16
- Participate in Weekly Interfaces and Conversions Support Sessions — 9 a.m. - 12 p.m.

MAY 18
- Participate in Weekly Interfaces and Conversions Support Sessions — 9 a.m. - 12 p.m.

MAY 22
- 2017 Release Training Liaison Conference Call — 9:30 a.m. - 11 a.m.
- TRNG708: Attend 2017 Release Training Liaison Web Meeting — 10 a.m. - 11 a.m.

MAY 23
- Participate in Weekly Interfaces and Conversions Support Sessions — 9 a.m. - 12 p.m.

MAY 25
- Participate in Weekly Interfaces and Conversions Support Sessions — 9 a.m. - 12 p.m.

MAY 29
- Memorial Day

MAY 30
- Participate in Weekly Interfaces and Conversions Support Sessions — 9 a.m. - 12 p.m.

For more the most current list of events, visit the Events Calendar on the FI$Cal website.

State Library Tells Their Wave 2 Story

they onboarded into the FI$Cal system with Wave 2, they decided it was also a good time to take over management of their accounting processes and establish their own accounting unit. Sharleen Finn, Fiscal Manager for the Library said, "I think in some ways standing up our own accounting unit at the same time as preparing for FI$Cal was almost an advantage for us. We didn't have to change any processes. We could use what we were learning about FI$Cal to help us create the processes we would use in our new unit."

With support from their Executives, the Library's Business Services Office and Fiscal Services Section made an investment in preparing for FI$Cal. Staff worked together to prepare for the Wave 2 Go Live by holding monthly meetings as a group, and smaller weekly meetings on specific issues, and exchanging a lot of emails. They made sure that they completed all the tasks FI$Cal required and took advantage of every opportunity to learn, by attending User Forums, workshops, and training sessions so they could

ask questions early and often. Business Process workshops were of great benefit because they helped staff work through the processes they would need to implement their new accounting unit. Sharleen said, "Asking questions and working out the answers with FI$Cal staff helped us with Wave 2 implementation."

The Library's participation in FI$Cal training programs did not stop with their Wave 2 onboarding. Staff still attend User Forums, Super User Workshops, and other FI$Cal training opportunities so they can make process adjustments and be prepared for the changes that come with new FI$Cal functionality. They realized early on that the work does not stop once a department has onboarded. Sharleen noted, "There are constant changes so departments should not be surprised if they have to make adjustments to their procedures and processes after starting to use the System."

An important piece of advice that Sharleen would give to future FI$Cal departments is to network

with other departments, because if a department is struggling with an issue, there may be another department struggling with the same issue and they can work to resolve it together. The Library has facilitated this by opening their doors to other State agencies and letting future FI$Cal departments visit their offices, review their processes and see how the Library uses FI$Cal.

Sharleen said, "Departments need to remember to be involved, be patient, and be flexible and you'll get there using FI$Cal."

Did You Know?

State employees can access online resources and databases through the California State Library.

Apply for a State Library card by filling out and submitting the online application on the Library Card Application page of the California State Library website.

No Forum in May

NEXT FORUM:

Wednesday
June 21, 2017

For more information please visit our website at:

www.fiscal.ca.gov

Coming Soon – ServiceNow

As part of ongoing efforts to improve customer service, the FI$Cal Service Center (FSC) is in the process of testing a new service ticket management tool called ServiceNow to replace the current ticketing system. More information will be provided once testing of the new tool is complete. The current target date for implementation of ServiceNow is mid-May.